

4 customer success playbooks

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Customer success playbooks

This collection of customer success playbooks will provide you with a comprehensive set of templates, each tailored to address specific facets of the customer journey. From onboarding and product feedback to low engagement and upselling to quarterly reviews and health score assessments, these playbooks offer actionable insights and structured guidelines to ensure you're always a step ahead.

Each template is prefilled with example text based on industry best practices yet offers the flexibility to fully customize it to your unique business needs. Dive in and equip your customer success team with the tools to drive unparalleled customer satisfaction and business growth.

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1 Customer onboarding playbook

Overview

This playbook aims to help new customers understand the value they'll get from our partnership.

Target customer base <i>(Which customers is this playbook targeting?)</i>		Objectives <i>(Add or replace objectives to match company and customer goals.)</i>
Roles <i>(Identify which teams will lead this effort and which teams will support it.)</i>		
Success team	Sales team	Customer service team
Resources <i>(Add relevant resource links to this playbook.)</i>		
Call scripts:	Email templates:	Internal documents:

Steps: *(Customize steps to match company processes.)*

Tasks: *(Customize tasks to match company processes.)*

Status:

In progress

Complete

In progress

Complete

In progress

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In progress

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In progress

Complete

2 Customer product feedback

Overview

This playbook aims to gather constructive feedback to improve product performance and the customer experience.

Target customer base <i>(Summarize your target customer base.)</i>		Objectives <i>(Add or replace existing objectives to match company goals.)</i>	
Roles <i>(Identify which teams will lead this effort and which teams will support it.)</i>			
Success team	Sales team	Customer service team	
Resources <i>(Add relevant resource links to this playbook.)</i>			
Call scripts:	Email templates:	Surveys:	

Steps: *(Customize steps to match company processes.)*

Tasks: *(Customize tasks to match company processes.)*

Status:

In progress

Complete

In progress

Complete

In progress

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In progress

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In progress

Complete

3 Low engagement playbook

Overview

This playbook aims to identify customers with low product usage to prevent future churn.

Target customer base <i>(Summarize your target customer base.)</i>		Objectives <i>(Add or replace existing objectives to match company goals.)</i>
Roles <i>(Identify which teams will lead this effort and which teams will support it.)</i>		
Success team	Sales team	Customer service team
Resources <i>(Add relevant resource links to this playbook.)</i>		
Call scripts:	Email templates:	Internal documents:

Steps: *(Customize steps to match company processes.)*

Tasks: *(Customize tasks to match company processes.)*

Status:

In progress

Complete

In progress

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In progress

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In progress

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In progress

Complete

4 Customer upsell playbook

Overview

This playbook aims to identify opportunities with existing customer accounts to upgrade plans.

Target customer base <i>(Summarize your target customer base.)</i>		Objectives <i>(Add or replace existing objectives to match company goals.)</i>	
Roles <i>(Identify which teams will lead this effort and which teams will support it.)</i>			
Success team	Sales team	Customer service team	
Resources <i>(Add relevant resource links to this playbook.)</i>			
Call scripts:	Email templates:	Internal documents:	

Steps: *(Customize steps to match company processes.)*

Tasks: *(Customize tasks to match company processes.)*

Status:

In progress

Complete

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